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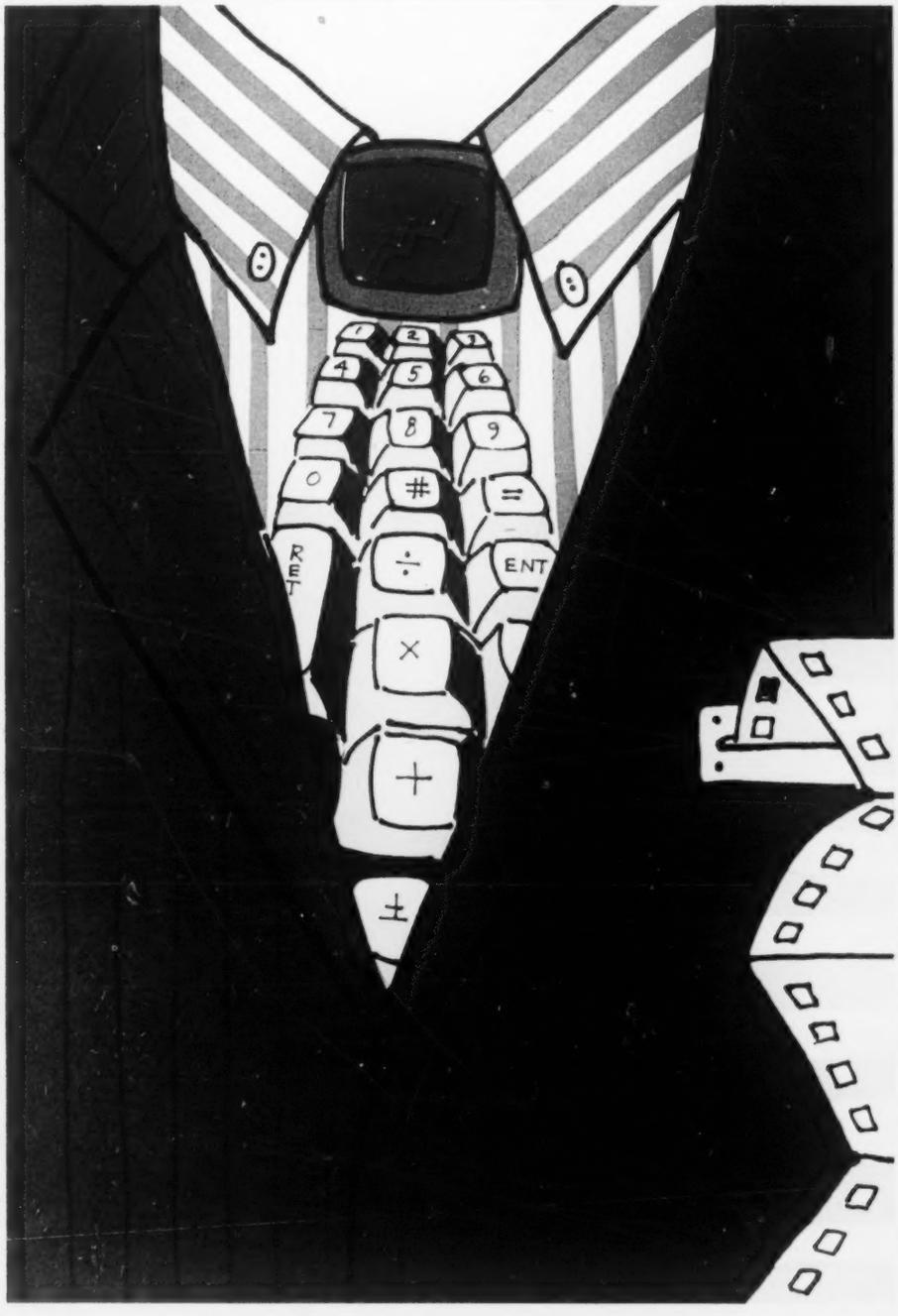
The Advertising FACT BOOK



Marc Gavin The Image Bank

Easy access to the best of Ad Age's files: Who's on top among advertisers, agencies, the media and more.

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NEWS SUMMARY

■ **'TV Guide'** will announce newsstand and subscription price increases this week as rival TVSM restructures for the national rollout of *Total TV*. 1

■ **Western marketers** in Russia took a cautious approach to price increases as the government lifted price controls. 1

■ **Thomas' English muffins** will "restore the normal balance" between advertising and promotion with a $9 million effort breaking on TV today. 1

■ **A. H. Robins** unit of American Home Products Corp. has asked other AHP agencies to work on alternatives to current Anacin ads, now handled by Partners & Shevack. 1

■ **Philips Consumer Electronics** unveils its digital compact cassette system, a new audiotape concept, at the Consumer Electronics Show this week. 3

■ **AIDS awareness ads** from Converse broke last week, and the major TV networks are being urged to run more AIDS-related public service announcements. 3

■ **Clairol** plans a March introduction of Ultimate Blonde home hair color, citing renewed popularity of blonde hair. 3

■ **Noxell** will upgrade its mass-market Clarion cosmetics line to a premium brand. 3

■ **Coors Brewing** will step up its international expansion as a hedge against a slowdown in U.S. sales. 4

■ **Environmental ad claims** have dwindled because of the lack of a national standard for such claims, says NAD's Ron Smithies. 4

■ **Direct marketers** could face back taxes if the U.S. Supreme Court decides states can collect sales taxes on mail purchases, the Direct Marketing Association argues. 4

■ **'Mademoiselle'** will, starting with its February issue, focus solely on fashion and beauty coverage in its main editorial "well," dropping such topics as relationships and careers. 12

■ **Mezzina/Brown** founders John Mezzina and William Brown say that although the $40 million Camel cigarette account is the new agency's only business, they're not a thinly veiled house agency and they're pursuing new business. 18

■ **Alka-Seltzer's** new advertising, to break next April, won't include the Speedy character, which was resurrected last month to help celebrate the 60th anniversary of the brand. 18

■ **Zeos International,** a mail-order computer house, put some $20 million into personal computer magazine advertising to become the largest advertiser in PC books. 18

■ **Publisher Ralph Ingersoll** hopes to build a network of niche magazines throughout Europe, starting with a weekly planned to make its debut in April. 20

■ **East/West Network,** once a leading publisher of in-flight magazines, is now down to two titles. 20

■ **Smartcars,** a franchise program for selling used cars, is growing as used-car sales outpace new-car sales. 22

■ **Fresca** diet soft drink from Coca-Cola USA will introduce new packaging early this year. 23

■ **Australian ad regulations** now allow foreign content to account for about 20% of all TV commercials. 26

DEPARTMENTS

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CBS fights back

Gloria Estefan to star in Super Bowl show

By Joe Mandese

CBS-TV will try to prevent viewers from tuning away from its halftime coverage of Super Bowl XXVI with a special performance by pop star Gloria Estefan.

Fox Broadcasting Co. earlier announced it would air counter-programming to the Jan. 26 event at halftime, apparently forcing the CBS countermove.

Fox will air a special live episode of its hit prime-time series "In Living Color" at that time.

Last week, Fox said it will counterprogram the CBS/Estefan halftime performance with a live performance by a major recording artist, to be named this week.

"The halftime performer that Fox has offers a very distinctive choice that is on the other end of the spectrum from Gloria Estefan," said Jay Coleman, president of Entertainment Marketing & Communications International. "It will be a performer that fits the profile of Fox and 'In Living Color.' "

Mr. Coleman said the promotion and advertising efforts for the Fox show, to be targeted at teens and young adults, will be the biggest ever for a one-time TV entertainment special.

"They can claim anything they want, but it's more of an example of promotion by press release," said George Schweitzer, senior VP-marketing and communications at CBS. "They're not even on seven nights a week. Our CBS daytime schedule reaches more people than all of their shows except three."

■ **New study says media weight has little to do with effectiveness of Super Bowl spots—Page 21.**

CBS' Super Bowl halftime show will feature a winter sports theme that will serve as a platform for the network's coverage of the 1992 Winter Olympics. It was unclear how Ms. Estefan's performance will be integrated into the show.

"The Super Bowl is the biggest television event of the year, and all of the amount of Fox promotion won't make a difference," Mr. Schweitzer said.

The Fox effort will break this week with an estimated $1 million radio campaign by Frito-Lay, via Tracy-Locke, Dallas, to be followed by in-store displays, newspaper inserts and ads targeted at children on Whittle Communications' "Channel One" school TV program.

Fox's on-air promotion effort will appear during the two weeks preceding the Super Bowl.

The Fox special, dubbed "Doritos Zaptime/The 'In Living Color' Super Halftime Party," is the first major effort ever to counterprogram Super Bowl halftime coverage.

"We're pretty confident that we have a good chance of getting people to switch," Mr. Coleman said, "because the halftime show has never really been designed for a television audience." □

Olds backs new Achieva with buy-back guarantee

By Raymond Serafin and Cleveland Horton

Oldsmobile will take the unprecedented step of offering to buy back its new Achieva from West Coast customers if they decide they'd rather buy a different car, even from a competitor.

That shows the extraordinary steps General Motors Corp. is willing to take to begin making inroads into the import-dominated West Coast market.

A 30-second TV spot that will air on West Coast network feeds starting Jan. 13 is almost as unusual as the guarantee itself—it names the Toyota Camry and Honda Accord, chief competitors for Olds' new compact sedan and coupe.

A customer has up to 30 days or 1,500 miles to return the Achieva and buy another vehicle to qualify for his money back.

Olds agency Leo Burnett USA, Chicago and Southfield, Mich., prepared both the national and West Coast-only advertising, said Michael Grimaldi, the division's general marketing manager.

National advertising includes two other :30s, one focusing on the car and the second on a $199-a-month lease program. Those two spots also break on the West Coast, then go national in mid-February.

"This will boldly and directly challenge the import market," said J. Michael Losh, Oldsmobile VP-general manager, who revealed the West Coast marketing plans at the Los Angeles Auto Show last week.

Cars like the Camry and Accord have cut deeply into Oldsmobile's sales volume, especially in California.

Achieva's national and regional advertising will feature the line "Never has so much thought gone into this much fun." Ads will retain Oldsmobile's overall theme, "The power of intelligent engineering."

Some observers are skeptical Oldsmobile can win the battle in California.

"That market, that's so committed to the imports, isn't going to slow down long enough to look at an Oldsmobile," said Jim Wangers, senior managing partner at Automotive Marketing Consultants. He added that the Achieva would fare better positioned against domestic competition.

Officials from GM's six vehicle-selling divisions have been meeting to forge a California strategy, with an important component being the identification of "core products" with a potential for increasing sales at the expense of import competitors (AA, Nov. 18).

GM had 28.7% of California vehicle sales in the first nine months of 1991, lagging behind the company's national share by about 7 points. Mr. Grimaldi said Oldsmobile has about a 3% share of the California market, more than 2 points less than the division's national share. □

Dec. good for discounters

By Ira Teinowitz

It was a ghost of Christmas past for department stores, as discount and some specialty stores got most of the holiday shopping goodies.

December sales figures, released last week, show Wal-Mart Stores' same-store sales surged 5% last month over December 1990 and that Kmart Corp. saw same-store sales rise 4%.

But same-store sales at Sears, Roebuck & Co. slipped 1.8% for the month. Sears said the U.S. portion of its business fell 0.6% in December, compared with December 1990, but grew 3.6% for the full November-December holiday season.

Among other chains reporting declines: Woolworth Corp., down 0.5% based on same-store sales; May Department Stores Co., down 1%; and Ann Taylor Stores, down 8.9% (including its leased shoe departments, and down 4% without the leased department).

"Stores have divided into two groups," said Kurt Barnard, president and publisher of *Barnard's Retail Marketing Report*. "The upscale stores have taken it on the chin. For them, it was not a very merry Christmas. But the second tier of retailers did better, and some moderate-price retailers came through with fireworks."

Mr. Barnard pointed to the 20% increase in sales reported by discounter Dollar General Corp., the 15.8% increase by the 50-off Stores and to the Gap's 14% increase in sales.

Other retailers reported minimal increases in sales, with J.C. Penney Co. up 0.4% at its department stores, though its catalog and drugstores raised the figure to 1.4%. Dayton Hudson Corp. reported sales grew 1.5%, though the company said the 6% growth in sales at its Target Stores discount chain far outpaced the 1% growth of sales in its department store division. Target's Mervyn's division reported an 8% de-

(Continued on Page 22)

The Advertising BOOK FACTS

Change is only constant in key AA business lists

By R. Craig Endicott

Charts invariably become dated the moment they're sent to the printer. So each chart presented in *The Advertising Fact Book* has been updated where necessary.

In updating the 100 Media Companies chart, Family Media was excluded, making room for former No. 101 Ackerley Communications. Family Media literally shuttered its offices as the 100 Top Media Companies ranking was issued in August.

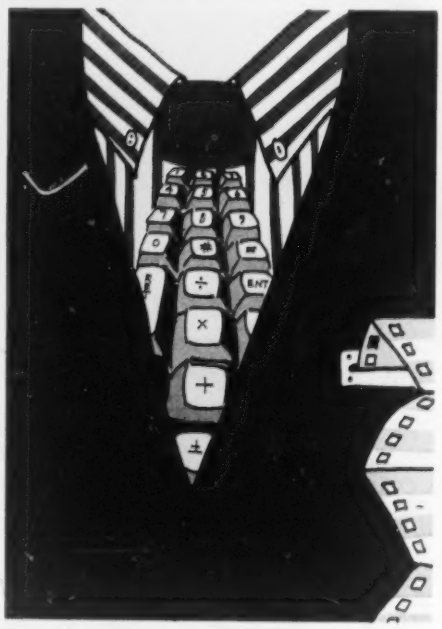
Family Media's closure led to the death of its *1,001 Home Ideas*, ranked No. 71 in revenues last June among the nation's magazines. Eliminating the title from the Top 100 made room for Advance Publications' *HG Magazine*.

New agencies entered the Top 200 agency brands chart to fill a vacuum left by Levine, Huntley, Vick & Beaver, the 34th largest U.S. ad agency that dissolved in late 1991, and former No. 196 Winius Brandon, bought by No. 146 Fogarty & Klein and now called Fogarty & Klein/Winius Brandon.

Other agencies just changed names, sometimes reflecting new affiliations.

In the case of mergers, no numbers were joined to trigger new rankings in the edited charts because the whole of a new company is rarely equal to the sum of its merged parts.

Other than providing a more current reading, a snapshot at the mid-life cycle of charts issued annually can project anticipated changes in future rankings.



Mike Quon/The Image Bank

Particularly revealing is the jockeying for position by media companies under way. Two are under bankruptcy reorganization protection, No. 49 Gillett Holdings and No. 55 Maxwell Communication Corp. Their positions are in jeopardy should properties be sold to pay creditors.

Two of the world's largest advertising organizations—No. 7 Eurocom Group and its former antagonist, No. 14 Roux Seguela Cayzac & Goudard, both Paris-based—have beaten their swords into plowshares and merged. The resulting unit could move ahead of Young & Rubicam into the No. 6 spot.

An added benefit of the *Fact Book* is that it offers the luxury of space to present numbers in new ways. The chart on the 100 Leading National Advertisers addresses U.S. sales as an expression of U.S. ad spending—an analysis not present in the September issue.

For example, No. 1 advertiser Procter & Gamble Co. drew sales of $6.70 in 1990 per $1 invested in advertising, down from $8.30 the year before. Wal-Mart Stores, No. 70 in total ad spending, generated $214.90 per ad dollar in 1990, up from $203.10. One could read into such ratios the growing marketing power of the retailer.

But the *Fact Book*, even in its updated and expanded version, is still but a thumbprint in time. The top five agencies, media companies and national advertisers today weren't the same set of companies five years ago, rendering change the only promise of any ranking. □

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Top 100 magazines **S-14**

100 leading national advertisers

Rank 1990	Rank 1989	Company, U.S. headquarters	Total U.S. ad spending 1990	Total U.S. ad spending 1989	Total U.S. ad spending % chg	Measured media 1990	Measured media 1989	Worldwide sales 1990	Worldwide sales 1989	Worldwide earnings 1990	Worldwide earnings 1989	U.S. sales 1990	U.S. sales 1989	U.S. sales/ad dollar 1990	U.S. sales/ad dollar 1989
1	2	**Procter & Gamble Co.**, Cincinnati	$2,284.5	$1,802.3	26.8	$1,240.0	$978.3	$27,026.0	$24,081.0	$1,773.0	$1,602.0	$15,276.0	$14,962.0	$6.7	$8.3
2	1	**Philip Morris Cos.**, New York	2,210.2	2,072.4	6.6	1,199.7	1,124.9	51,169.0	44,080.0	3,540.0	2,946.0	36,014.0	33,178.0	16.3	16.0
3	3	**Sears, Roebuck & Co.**, Chicago	1,507.1	1,465.0	2.9	590.8	574.3	55,972.0	53,794.0	902.0	1,509.0	51,751.0	49,659.0	34.3	33.9
4	4	**General Motors Corp.**, Detroit	1,502.8	1,363.8	10.2	1,100.9	999.1	124,705.0	126,931.9	(1,986.0)	4,224.3	86,967.0	93,878.4	57.9	68.8
5	5	**Grand Metropolitan**, London	882.6	806.2	9.5	402.1	367.3	16,616.0	15,567.1	1,132.0	863.9	8,025.0	6,228.2	9.1	7.7
6	6	**PepsiCo**, Purchase, N.Y.	849.1	786.1	8.0	547.0	506.4	17,803.0	15,242.0	1,091.0	901.0	14,047.0	12,519.4	16.5	15.9
7	17	**AT&T Co.**, New York	796.5	567.8	40.3	505.4	360.3	37,285.0	36,149.0	2,735.0	2,697.0	NA	NA	NA	NA
8	7	**McDonald's Corp.**, Oak Brook, Ill.	764.1	774.4	(1.3)	426.0	431.8	6,640.0	6,066.0	802.0	727.0	3,871.0	3,887.0	5.1	5.0
9	18	**Kmart Corp.**, Troy, Mich.	693.2	561.7	23.4	230.0	186.4	32,070.0	29,533.0	756.0	323.0	30,971.0	26,441.0	44.7	50.6
10	16	**Time Warner**, New York	676.9	582.0	16.3	358.7	308.4	11,517.0	10,779.0	(227.0)	(432.0)	8,550.0	6,361.0	12.6	10.9
11	8	**Eastman Kodak Co.**, Rochester, N.Y.	664.8	719.0	(7.5)	218.2	236.0	18,908.0	18,398.0	703.0	529.0	10,663.0	10,869.0	16.0	15.1
12	20	**Johnson & Johnson**, New Brunswick, N.J.	653.7	505.7	29.3	330.9	256.0	11,232.0	9,575.0	1,143.0	1,082.0	5,427.0	4,881.0	8.3	9.7
13	9	**RJR Nabisco**, Winston-Salem, N.C.	636.1	696.7	(8.7)	349.3	382.6	13,879.0	12,764.0	(429.0)	(1,149.0)	12,125.0	10,521.0	19.1	15.1
14	11	**Nestle SA**, Vevey, Switzerland	635.9	618.0	2.9	325.8	316.6	36,511.0	30,596.0	1,789.0	1,536.0	NA	NA	NA	NA
15	15	**Warner-Lambert Co.**, Morris Plains, N.J.	630.8	587.8	7.3	215.7	201.0	4,687.0	4,195.8	485.0	412.7	2,445.0	2,249.0	3.9	3.8
16	10	**Ford Motor Co.**, Dearborn, Mich.	616.0	618.8	(0.4)	471.3	473.5	97,650.0	96,145.9	860.0	3,935.0	56,902.0	61,452.0	92.4	99.3
17	24	**Toyota Motor Corp.**, Toyota City, Japan	580.7	417.6	39.0	406.5	292.3	71,400.0	60,083.9	3,100.0	2,884.3	NA	NA	NA	NA
18	12	**Kellogg Co.**, Battle Creek, Mich.	577.7	611.6	(5.5)	404.4	428.1	5,181.0	4,651.7	502.8	470.2	3,043.8	2,940.5	5.3	4.8
19	13	**Unilever NV**, London/Rotterdam	568.9	604.4	(5.9)	355.9	378.1	39,620.0	33,444.0	1,634.0	1,629.0	8,680.1	8,113.8	15.3	13.4
20	21	**General Mills**, Minneapolis	539.0	467.6	15.3	406.6	352.7	7,153.0	6,448.3	473.0	381.0	6,377.0	5,796.1	11.8	12.4
21	19	**Chrysler Corp.**, Highland Park, Mich.	528.4	533.3	(0.9)	412.7	416.5	30,620.0	35,186.0	68.0	359.0	26,887.0	31,014.0	50.9	58.2
22	14	**Anheuser-Busch Cos.**, St. Louis	459.2	591.5	(22.4)	301.3	388.1	11,611.7	10,283.6	842.4	767.2	NA	NA	NA	NA
23	33	**Walt Disney Co.**, Burbank, Calif.	435.7	338.4	28.7	229.2	178.0	5,844.0	4,594.3	824.0	703.3	NA	NA	NA	NA
24	22	**Bristol-Myers Squibb Co.**, New York	428.7	451.4	(5.0)	223.8	235.6	10,300.0	9,189.0	1,748.0	747.0	7,017.0	6,478.0	16.4	14.4
25	26	**American Home Products Corp.**, New York	415.4	407.0	2.1	234.3	229.6	6,755.2	6,747.0	1,230.6	1,102.2	4,607.6	4,725.7	11.1	11.6
26	29	**Sony Corp.**, Tokyo	410.5	358.3	14.6	246.0	214.7	25,649.1	18,343.0	829.3	654.8	7,474.8	5,466.2	18.2	15.3
27	38	**Nissan Motor Co.**, Tokyo	410.2	300.6	36.5	323.4	237.0	42,300.0	40,000.0	340.0	823.0	NA	NA	NA	NA
28	25	**J.C. Penney Co.**, New York	393.8	407.5	(3.4)	153.6	158.9	16,365.0	16,103.0	577.0	802.0	16,365.0	16,103.0	41.6	39.5
29	28	**Coca-Cola Co.**, Atlanta	377.2	381.4	(1.1)	224.6	227.1	10,236.0	8,965.8	1,382.0	1,723.8	3,931.0	3,679.0	10.4	9.6
30	31	**May Department Stores Co.**, St. Louis	363.6	345.9	5.1	254.5	242.1	10,035.0	9,336.0	500.0	515.0	10,035.0	9,336.0	27.6	27.0
31	23	**Ralston Purina Co.**, St. Louis	354.5	429.5	(17.5)	127.6	154.6	7,101.0	6,658.3	396.0	422.5	5,084.0	4,826.0	14.3	11.2
32	42	**Hershey Foods Corp.**, Hershey, Pa.	338.7	290.9	16.4	108.7	93.3	2,715.6	2,421.0	215.9	171.1	2,508.5	2,235.7	7.4	7.7
33	37	**Matsushita Electric Industrial Co.**, Secaucus, N.J.	330.2	301.7	9.5	165.0	150.8	46,804.0	42,573.0	1,836.0	1,671.0	5,400.0	NA	16.4	NA
34	30	**Quaker Oats Co.**, Chicago	329.3	357.8	(8.0)	165.0	179.3	5,491.0	5,030.6	206.0	169.0	3,860.0	3,610.0	11.7	10.1
35	34	**Dayton Hudson Corp.**, Minneapolis	318.7	316.1	0.8	167.7	166.3	14,739.0	13,644.0	410.0	410.0	14,739.0	13,644.0	46.2	43.2
36	39	**Honda Motor Co.**, Tokyo	318.0	298.8	6.4	231.5	217.5	30,507.0	27,326.0	541.0	579.0	NA	NA	NA	NA
37	32	**H.J. Heinz Co.**, Pittsburgh	307.9	342.3	(10.0)	134.2	149.2	6,647.1	6,085.7	568.0	504.5	3,863.1	3,779.9	12.5	11.0
38	27	**Sara Lee Corp.**, Chicago	306.7	382.3	(19.8)	145.5	181.4	12,381.0	11,606.0	535.0	470.3	8,597.9	8,302.4	28.0	21.7
39	36	**U.S. Government**, Washington	304.0	310.2	(2.0)	181.1	184.8	NA	NA	NA	NA	NA	NA	NA	NA
40	46	**Pfizer Inc.**, New York	279.9	235.3	19.0	114.8	96.5	6,406.0	5,671.5	801.2	681.1	3,472.9	3,096.6	12.4	13.2
41	40	**Federated Department Stores**, Cincinnati	273.7	294.9	(7.2)	155.9	168.0	NA	10,439.0	NA	(1,740.0)	NA	10,237.0	NA	34.7
42	41	**Mars Inc.**, McLean, Va.	272.4	293.3	(7.1)	148.8	160.2	8,000.0	8,000.0	NA	NA	NA	NA	NA	NA
43	35	**R.H. Macy & Co.**, New York	272.2	312.7	(13.0)	177.5	203.9	7,267.0	6,974.1	(147.0)	(47.0)	NA	NA	NA	NA
44	44	**Colgate-Palmolive Co.**, New York	265.0	257.3	3.0	82.0	79.6	5,691.0	5,038.8	321.0	280.0	1,899.0	1,828.0	7.2	7.1
45	56	**Mazda Motor Corp.**, Hiroshima, Japan	247.9	196.3	26.3	181.2	143.5	15,800.0	14,500.0	191.0	188.0	NA	NA	NA	NA
46	49	**ConAgra**, Omaha	246.1	223.1	10.3	110.3	100.0	19,504.7	15,501.2	311.2	231.7	NA	NA	NA	NA
47	47	**Tandy Corp.**, Fort Worth, Texas	232.7	233.1	(0.2)	86.2	86.3	4,561.8	4,499.6	195.4	290.3	4,222.5	4,202.2	18.1	18.0
48	45	**General Electric Co.**, New York	230.2	249.1	(7.6)	105.1	113.8	58,414.0	54,574.0	4,303.0	3,939.0	51,270.0	48,912.0	222.7	196.4
49	52	**American Brands**, New York	227.1	210.7	7.8	100.9	93.6	13,780.9	11,921.4	596.0	630.8	4,686.4	4,521.7	20.6	21.5
50	43	**American Express Co.**, New York	217.7	268.0	(18.8)	154.1	189.7	24,322.0	25,047.0	181.0	1,157.0	19,459.0	20,617.0	89.4	76.9
51	51	**Montgomery Ward & Co.**, Chicago	205.6	213.6	(3.8)	103.2	107.2	5,500.0	5,323.0	153.0	151.0	5,500.0	5,323.0	26.8	24.9
52	50	**American Stores Co.**, Salt Lake City, Utah	204.7	220.0	(7.0)	129.0	138.6	22,155.5	22,004.2	182.4	118.1	22,155.5	22,004.2	108.2	100.0
53	53	**Adolph Coors Co.**, Golden, Colo.	194.6	202.1	(3.7)	122.6	127.3	1,863.4	1,763.9	38.9	13.1	NA	NA	NA	NA
54	48	**Hasbro Inc.**, Pawtucket, R.I.	191.8	225.0	(14.8)	156.1	183.1	1,520.0	1,409.7	89.2	92.2	938.8	954.3	4.9	4.2
55	57	**SmithKline Beecham**, London	191.4	192.0	(0.3)	102.4	102.7	9,194.5	9,451.2	1,634.7	250.9	3,873.5	3,782.8	20.2	19.7
56	73	**Loews Corp.**, New York	186.2	143.0	30.2	103.9	79.8	12,636.9	11,436.7	804.7	907.1	NA	NA	NA	NA
57	58	**Gillette Co.**, Boston	181.7	185.1	(1.8)	82.1	97.8	4,344.0	3,818.5	368.0	284.7	1,433.0	1,348.0	7.9	7.3
58	99	**Nike Inc.**, Beaverton, Ore.	178.8	104.6	70.9	87.7	51.3	3,004.0	2,235.0	287.0	243.0	2,142.0	1,755.0	12.0	16.8
59	62	**Goodyear Tire & Rubber Co.**, Akron, Ohio	178.7	168.3	6.2	70.9	66.8	11,273.0	10,869.3	(38.0)	206.8	6,460.0	6,421.3	36.2	38.2
60	60	**Philips NV**, Eindhoven, The Netherlands	177.7	177.1	0.3	89.1	88.8	32,996.4	29,960.2	(2,509.0)	719.4	6,119.0	6,187.9	34.4	34.9
61	59	**U.S. dairy farmers**, Arlington, Va.	175.9	183.1	(4.0)	95.0	98.9	NA	NA	NA	NA	NA	NA	NA	NA
62	55	**Campbell Soup Co.**, Camden, N.J.	175.3	196.7	(10.9)	116.9	131.2	6,204.0	6,206.0	403.0	4.0	3,912.0	3,933.0	22.3	20.0
63	61	**Clorox Co.**, Oakland, Calif.	173.4	172.6	0.5	129.1	128.5	1,646.5	1,484.0	52.7	153.6	NA	NA	NA	NA
64	74	**Paramount Communications**, New York	162.3	141.2	14.9	98.2	85.4	3,869.0	3,391.6	259.0	1,465.0	NA	NA	NA	NA
65	88	**Levi Strauss & Co.**, San Francisco	158.9	123.1	29.1	66.1	51.2	4,250.0	3,630.0	251.0	272.0	NA	NA	NA	NA
66	65	**S.C. Johnson & Son**, Racine, Wis.	158.1	160.1	(1.2)	86.6	87.7	3,000.0	2,500.0	NA	NA	NA	NA	NA	NA
67	72	**Carter Hawley Hale Stores**, Los Angeles	157.4	145.6	8.2	85.9	79.5	2,858.0	2,787.4	(26.0)	13.0	2,858.0	2,787.4	18.2	19.1
68	90	**United Telecommunications**, Shawnee Mission, Kan.	155.3	121.3	28.1	81.3	63.5	8,345.1	7,549.0	308.7	362.9	8,345.1	7,549.0	53.7	62.2
69	81	**Circuit City Stores**, Richmond, Va.	153.0	131.2	16.6	91.8	78.7	2,366.0	2,096.6	3.2	78.1	2,366.0	2,096.6	15.5	16.0
70	86	**Wal-Mart Stores**, Bentonville, Ark.	151.7	127.1	19.4	61.3	51.4	32,601.6	25,810.7	1,291.0	1,075.9	32,601.6	25,810.7	214.9	203.1
71	54	**IBM Corp.**, Armonk, N.Y.	148.7	196.9	(24.5)	77.3	102.4	69,018.0	62,710.0	6,020.0	3,756.0	27,132.0	25,745.0	182.5	130.8
72	76	**Hallmark Cards**, Kansas City, Mo.	146.8	138.2	6.2	87.0	81.9	2,500.0	2,500.0	NA	NA	NA	NA	NA	NA
73	111	**Helene Curtis Industries**, Chicago	145.4	93.7	55.2	96.2	62.0	867.3	690.9	6.5	17.5	639.5	533.9	4.4	5.7
74	68	**Revlon Group**, New York	143.6	154.0	(6.8)	71.7	76.9	3,237.0	2,941.8	142.0	52.8	1,918.0	1,890.0	13.4	12.3
75	82	**AMR Corp.**, Dallas	142.5	131.0	8.8	104.3	95.9	11,719.6	10,479.6	(40.0)	454.8	NA	NA	NA	NA
76	63	**Dow Chemical Co.**, Midland, Mich.	141.9	168.1	(15.6)	105.6	125.1	19,773.0	17,600.0	1,378.0	2,486.0	9,494.0	8,084.0	66.9	48.1
77	67	**Mobil Corp.**, New York	140.3	156.3	(10.2)	43.1	48.0	64,472.0	56,188.0	1,929.0	1,809.0	21,198.0	19,191.0	151.1	122.8
78	93	**Marriott Corp.**, Washington	139.6	116.2	20.1	51.2	42.6	7,646.0	7,536.0	47.0	177.0	NA	NA	NA	NA
79	80	**Volkswagen AG**, Troy, Mich.	138.5	131.9	5.0	96.9	92.3	41,816.7	34,822.9	667.2	553.2	2,531.0	2,283.0	18.3	17.3
80	64	**CPC International**, Englewood Cliffs, N.J.	137.0	165.8	(17.3)	50.2	60.8	5,781.0	5,103.0	374.0	328.0	2,322.0	2,260.0	16.9	13.6
81	77	**Seagram Co., New York**	135.3	136.8	(1.1)	100.7	101.8	6,127.0	5,581.8	756.0	710.6	2,779.0	2,742.0	20.5	20.0
82	75	**Hyundai Group**, Seoul, S. Korea	135.3	139.1	(2.7)	96.6	99.3	40,250.0	32,200.0	93.0	53.0	NA	NA	NA	NA
83	84	**ITT Corp., New York**	134.9	128.5	4.9	42.7	34.0	20,604.0	20,005.0	1,056.0	927.0	14,106.0	14,278.0	104.6	111.1
84	79	**Bell Atlantic Corp.**, Philadelphia	134.2	131.9	1.7	57.6	56.6	12,298.0	11,448.6	1,323.0	1,074.5	NA	NA	NA	NA
85	125	**Thompson Medical Co./Slim-Fast Food Co.**, New York	133.4	84.8	57.3	110.1	70.0	NA	NA	NA	NA	NA	NA	NA	NA
86	92	**Kroger Co.**, Cincinnati	131.1	116.8	12.3	59.1	52.7	20,261.0	19,104.0	8.2	(73.0)	20,261.0	19,104.0	154.5	164.3
87	87	**Wm. Wrigley Jr. Co.**, Chicago	129.1	124.3	3.9	118.3	113.9	1,111.0	992.9	117.0	106.1	714.5	673.9	5.5	5.4
88	83	**News Corp.**, Sydney	126.7	130.2	(2.7)	121.2	124.5	8,586.7	6,719.7	(308.0)	263.2	5,134.3	3,780.4	40.5	29.0
89	94	**Delta Air Lines**, Atlanta	126.5	116.0	9.1	94.9	87.0	NA	8,582.2	NA	302.8	NA	NA	NA	NA
90	71	**Citicorp**, New York	124.9	146.3	(14.6)	88.7	103.9	14,587.0	13,752.0	458.0	498.0	9,055.0	8,747.0	72.5	59.8
91	70	**Schering-Plough Corp.**, Madison, N.J.	124.9	150.4	(17.0)	60.4	72.7	3,322.9	3,157.9	565.1	471.3	1,890.2	1,749.1	15.1	11.6
92	95	**Daimler-Benz Group**, Stuttgart, Germany	124.6	115.5	7.8	92.4	85.6	52,531.0	43,320.0	1,103.0	905.8	7,884.0	7,193.0	63.3	62.3
93	85	**UAL Corp.**, Elk Grove Village, Ill.	123.5	127.3	(3.0)	83.8	86.4	11,037.5	9,793.6	94.5	324.2	8,027.5	7,614.6	65.0	59.8
94	91	**Nynex Corp.**, New York	121.5	120.7	0.7	63.2	62.8	13,585.0	13,211.0	949.0	808.0	NA	NA	NA	NA
95	105	**U.S. Shoe Corp.**, Cincinnati	120.7	97.2	24.1	56.4	45.4	2,718.7	2,557.2	433.3	487.3	NA	NA	NA	NA
96	89	**Wendy's International**, Dublin, Ohio	119.8	122.4	(2.1)	91.1	93.1	1,010.0	1,069.7	39.0	30.4	NA	NA	NA	NA
97	104	**Canon Inc.**, Tokyo	119.5	99.7	19.8	65.7	54.8	12,800.0	10,007.0	455.0	284.0	3,820.0	3,058.0	32.0	30.7
98	96	**Bayer AG**, Leverkusen, Germany	115.3	112.0	3.0	67.8	65.9	25,718.0	26,740.0	1,274.0	1,416.0	5,904.0	5,425.0	51.2	48.4
99	123	**Upjohn Co.**, Kalamazoo, Mich.	114.9	84.9	35.3	74.7	55.2	3,021.0	2,725.0	706.0	515.0	2,248.0	2,028.0	19.6	23.9
100	101	**Monsanto Co.**, St. Louis	114.6	102.6	11.7	73.0	65.3	8,995.0	8,681.0	346.0	679.0	5,685.0	5,590.0	49.6	54.5

Notes: Dollars are in millions. Ad dollar totals are AA estimates. Sales and earnings are current through Sept. 1991 and are from public documents. Measured media provided by LNA/Arbitron Multi-Media Service. This chart is updated from 100 Leading National Advertisers (AA, Sept. 25).

100 leading media companies

Rank 1990	Rank 1989	Company, U.S. headquarters	Total media revenue 1990	Total media revenue 1989	% chg	Newspaper revenue 1990	Newspaper revenue 1989	Magazine revenue 1990	Magazine revenue 1989	Broadcast* revenue 1990	Broadcast* revenue 1989	Cable TV revenue 1990	Cable TV revenue 1989	Other media revenue 1990	Other media revenue 1989
1	1	**Capital Cities/ABC**, New York	$5,175.4	$4,767.0	8.6	$524.2	$490.9	$367.2	$376.1	$3,842.0	$3,584.9	$442.0	$315.1	—	—
2	2	**Time Warner**, New York	4,964.8	4,575.0	8.5	—	—	1,947.8	1,855.0	—	—	3,017.0	2,720.0	—	—
3	3	**Gannett Co.**, Arlington, Va.	3,441.6	3,518.2	(2.2)	2,775.2	2,852.0	—	—	396.7	408.3	—	—	$271.4	$257.9
4	5	**CBS Inc.**, New York	3,261.2	2,959.9	10.2	—	—	—	—	3,261.2	2,959.9	—	—	—	—
5	4	**General Electric Co.**, Fairfield, Conn.	3,236.0	3,392.0	(4.6)	—	—	—	—	3,202.9	3,392.0	33.1	NA	—	—
6	6	**Advance Publications**, Newark, N.J.	3,039.6	2,881.7	5.5	1,797.0	1,745.0	845.0	841.9	—	—	397.6	294.8	—	—
7	8	**Telecommunications Inc.**, Denver	2,942.0	2,362.0	24.6	—	—	—	—	—	—	2,942.0	2,362.0	—	—
8	7	**Times Mirror Co.**, Los Angeles	2,855.2	2,807.1	1.7	2,066.0	2,065.9	313.4	305.9	104.5	102.8	371.3	332.5	—	—
9	NA	**News Corp.**, New York	2,234.4	NA	NA	174.4	NA	707.3	NA	834.8	700.0	—	—	517.9	506.0
10	10	**Hearst Corp.**, New York	2,137.6	2,074.0	3.1	715.0	700.0	1,022.0	992.5	289.6	270.5	—	—	111.0	111.0
11	9	**Knight-Ridder**, Miami	2,106.1	2,096.7	0.4	1,992.1	1,994.9	—	—	—	—	114.0	101.8	—	—
12	11	**New York Times Co.**, New York	1,776.8	1,768.9	0.4	1,358.3	1,398.5	340.0	295.6	69.0	65.8	—	—	9.5	9.0
13	13	**Cox Enterprises**, Atlanta	1,710.9	1,664.0	2.8	744.8	754.0	—	—	419.1	400.5	547.0	509.5	—	—
14	12	**Tribune Co.**, Chicago	1,703.0	1,676.8	1.6	1,196.7	1,208.7	—	—	506.3	468.1	—	—	—	—
15	15	**Thomson Corp.**, New York	1,404.0	1,327.6	5.8	654.0	594.5	750.0	733.1	—	—	—	—	—	—
16	14	**Washington Post Co.**, Washington	1,356.1	1,372.9	(1.2)	691.0	726.7	340.2	334.4	179.4	182.5	145.5	129.3	—	—
17	16	**Viacom International**, New York	1,337.5	1,198.7	11.6	—	—	—	—	164.0	146.1	1,173.5	1,052.6	—	—
18	17	**E.W. Scripps**, Cincinnati	1,220.0	1,181.1	3.3	784.6	781.2	—	—	235.9	222.6	199.4	177.3	—	—
19	20	**Turner Broadcasting System**, Atlanta	1,069.1	736.8	45.1	—	—	—	—	—	—	1,069.1	736.8	—	—
20	18	**Dow Jones & Co.**, New York	983.7	991.7	(0.8)	983.7	991.7	—	—	—	—	—	—	—	—
21	19	**Continental Cablevision**, Boston	938.0	780.0	20.3	—	—	—	—	—	—	938.0	780.0	—	—
22	21	**Reed Publishing USA**, Newton, Mass.	804.0	730.0	10.1	—	—	624.0	580.0	—	—	—	—	180.0	150.0
23	22	**Westinghouse Electric Corp.**, Pittsburgh	734.0	646.0	13.6	—	—	—	—	734.0	646.0	—	—	—	—
24	23	**Reader's Digest Association**, Pleasantville, N.Y.	681.4	636.7	7.0	—	—	681.4	636.7	—	—	—	—	—	—
25	24	**Advo-Systems**, Windsor, Conn.	655.0	617.7	6.0	—	—	—	—	—	—	—	—	655.0	617.7
26	25	**MediaNews Group**, Dallas	600.0	594.2	1.0	600.0	594.2	—	—	—	—	—	—	—	—
27	31	**Comcast Corp.**, Bala-Cynwyd, Pa.	591.8	502.6	17.7	—	—	—	—	—	—	591.8	502.6	—	—
28	26	**McGraw-Hill**, New York	589.0	557.3	5.7	—	—	485.0	460.0	104.0	97.3	—	—	—	—
29	28	**Valassis Inserts**, Livonia, Mich.	574.0	524.0	9.5	—	—	—	—	—	—	—	—	574.0	524.0
30	32	**Cablevision Systems Corp.**, Woodbury, N.Y.	563.0	492.7	14.3	—	—	—	—	—	—	563.0	492.7	—	—
31	30	**SCI Holdings**, Miami	553.1	516.0	7.2	—	—	—	—	—	—	553.1	516.0	—	—
32	27	**Meredith Corp.**, Des Moines, Iowa	543.8	531.4	2.3	—	—	432.0	417.1	111.8	114.3	—	—	—	—
33	38	**International Data Group**, Framingham, Mass.	528.0	420.0	25.7	—	—	528.0	420.0	—	—	—	—	—	—
34	29	**Affiliated Publications**, Boston	510.2	517.7	(1.4)	416.0	438.2	94.3	79.5	—	—	—	—	—	—
35	34	**Freedom Newspapers**, Irvine, Calif.	485.0	449.7	7.8	400.0	367.0	—	—	85.0	82.7	—	—	—	—
36	33	**Media General**, Richmond, Va.	467.8	452.5	3.4	302.8	300.5	13.3	13.5	55.7	55.1	95.9	83.3	—	—
37	37	**Chronicle Publishing Co.**, San Francisco	440.0	421.0	4.5	248.0	247.0	—	—	108.0	99.0	84.0	75.0	—	—
38	39	**A. H. Belo Corp.**, Dallas	439.7	418.4	5.1	247.1	239.2	—	—	192.6	179.2	—	—	—	—
39	35	**Central Newspapers**, Indianapolis	431.7	436.2	(1.0)	431.7	436.2	—	—	—	—	—	—	—	—
40	41	**Landmark Communications**, Norfolk, Va.	425.0	414.0	2.7	372.5	366.2	—	—	15.9	16.3	36.6	31.5	—	—
41	48	**Reuters Holdings PLC**, New York	419.0	382.9	9.4	—	—	—	—	—	—	—	—	419.0	382.9
42	43	**Oklahoma Publishing Co.**, Oklahoma City	416.5	399.6	4.2	127.0	127.0	—	—	160.0	159.6	129.5	113.0	—	—
43	40	**Harte-Hanks Communications**, San Antonio, Texas	411.1	414.8	(0.9)	307.7	318.5	—	—	23.0	20.9	—	—	80.4	75.4
44	50	**McClatchy Newspapers**, Sacramento, Calif.	405.9	365.6	11.0	405.9	365.6	—	—	—	—	—	—	—	—
45	44	**Copley Newspapers**, La Jolla, Calif.	405.2	399.2	1.5	405.2	399.2	—	—	—	—	—	—	—	—
46	45	**Morris Communications**, Augusta, Ga.	402.8	395.3	1.9	273.0	265.5	—	—	—	—	—	—	129.8	129.8
47	42	**Pulitzer Publishing Co.**, St. Louis	402.8	402.2	0.1	287.3	296.8	—	—	115.5	105.4	—	—	—	—
48	47	**Multimedia Inc.**, Greenville, S.C.	390.7	384.7	1.5	135.4	137.9	—	—	134.8	136.9	120.5	109.9	—	—
49	49	**Gillett Holdings**, Denver	390.0	374.0	4.3	—	—	—	—	390.0	374.0	—	—	—	—
50	46	**Hachette Publications**, New York	387.0	395.0	(2.0)	—	—	387.0	395.0	—	—	—	—	—	—
51	NA	**K-III Holdings**, New York	361.9	NA	NA	70.0	NA	291.9	230.5	—	—	—	—	—	—
52	54	**Paramount Communications**, New York	356.8	300.5	18.7	—	—	—	—	145.0	130.5	211.8	170.0	—	—
53	52	**Donrey Media Group**, Fort Smith, Ark.	323.6	312.2	3.6	245.0	236.8	—	—	10.3	9.7	14.0	11.4	54.3	54.3
54	51	**Journal Register Company**, Trenton, N.J.	323.0	320.0	0.9	323.0	320.0	—	—	—	—	—	—	—	—
55	36	**Maxwell Communication**, New York	321.8	422.0	(23.7)	321.8	422.0	—	—	—	—	—	—	—	—
56	55	**Providence Journal Co.**, Providence, R.I.	320.3	296.5	8.0	131.0	133.0	—	—	46.0	42.0	143.3	121.5	—	—
57	56	**Associated Press**, New York	311.9	287.6	8.4	—	—	—	—	—	—	—	—	311.9	287.6
58	53	**Cowles Media Co.**, Minneapolis	307.6	308.5	(0.3)	251.2	259.0	56.4	49.5	—	—	—	—	—	—
59	58	**Cablevision Industries Corp.**, Liberty, N.Y.	299.4	258.8	15.7	—	—	—	—	—	—	299.4	258.8	—	—
60	64	**Ziff Communications**, New York	290.0	240.0	20.8	—	—	290.0	240.0	—	—	—	—	—	—
61	57	**Journal Communications**, Milwaukee	289.0	282.5	2.3	232.5	228.4	—	—	56.5	54.1	—	—	—	—
62	59	**National Geographic Society**, Washington	279.6	255.5	9.4	—	—	279.6	255.5	—	—	—	—	—	—
63	63	**Chris-Craft Industries**, New York	278.1	246.7	12.7	—	—	—	—	278.1	246.7	—	—	—	—
64	65	**Sammons Communications**, Dallas	268.5	239.0	12.3	—	—	—	—	—	—	268.5	239.0	—	—
65	61	**Lee Enterprises**, Davenport, Iowa	267.8	250.0	7.1	196.5	180.2	—	—	71.3	69.8	—	—	—	—
66	60	**3M**, St. Paul, Minn.	265.0	250.0	6.0	—	—	—	—	—	—	—	—	265.0	250.0
67	66	**Adelphia Communications Corp.**, Coudersport, Pa.	250.2	229.6	9.0	—	—	—	—	—	—	250.2	229.6	—	—
68	62	**Chicago Sun-Times Co.**, Chicago	244.0	249.5	(2.2)	244.0	249.5	—	—	—	—	—	—	—	—
69	70	**Maclean Hunter**, Chicago	243.1	210.7	15.4	—	—	83.6	79.4	—	—	159.5	131.3	—	—
70	90	**Enquirer/Star Group**, New York	235.8	153.0	54.1	—	—	235.8	153.0	—	—	—	—	—	—
71	75	**TeleCable Corp.**, Norfolk, Va.	231.0	204.0	13.2	—	—	—	—	—	—	231.0	204.0	—	—
72	67	**Blade Communications**, Toledo, Ohio	226.0	225.0	0.4	172.0	173.0	—	—	18.0	17.0	36.0	35.0	—	—
73	69	**Forbes Inc.**, New York	225.7	213.1	5.9	6.7	6.6	219.0	206.5	—	—	—	—	—	—
74	68	**Petersen Publishing Co.**, Los Angeles	224.3	214.8	4.4	—	—	224.3	214.8	—	—	—	—	—	—
75	78	**Century Communications Corp.**, New Canaan, Conn.	219.4	188.2	16.6	—	—	—	—	—	—	219.4	188.2	—	—
76	71	**Times Publishing Co.**, St. Petersburg, Fla.	213.0	209.0	1.9	183.0	181.0	30.0	28.0	—	—	—	—	—	—
77	76	**Seattle Times Co.**, Seattle	210.0	200.0	5.0	210.0	200.0	—	—	—	—	—	—	—	—
78	72	**Dispatch Printing Co.**, Columbus, Ohio	205.4	205.4	0.0	140.0	140.0	2.1	2.1	63.3	63.3	—	—	—	—
79	77	**Great American Communications Co.**, Cincinnati	204.6	197.7	3.5	—	—	—	—	204.6	197.7	—	—	—	—
80	82	**Heritage Media Corp.**, Dallas	203.9	165.0	23.5	—	—	—	—	51.0	48.9	—	—	152.9	116.1
81	73	**Edgell Communications**, Cleveland	202.0	205.0	(1.5)	—	—	202.0	205.0	—	—	—	—	—	—
82	83	**Whittle Communications**, Knoxville, Tenn.	201.6	153.3	31.5	—	—	20.4	65.1	106.4	11.0	—	—	74.8	77.2
83	92	**Houston Industries**, Houston	199.9	150.4	32.9	—	—	—	—	—	—	199.9	150.4	—	—
84	NA	**American Express Co.**, New York	190.0	NA	NA	—	—	190.0	NA	—	—	—	—	—	—
85	88	**Pinelands Inc.**, Secaucus, N.J.	181.1	157.6	14.9	—	—	—	—	181.1	157.6	—	—	—	—
86	79	**Patrick Media Group**, Scranton, Pa.	178.5	182.0	(1.9)	—	—	—	—	—	—	—	—	178.5	182.0
87	94	**Univision Holdings**, New York	175.1	145.9	20.0	—	—	2.0	0.7	165.8	141.0	—	—	7.4	4.3
88	89	**CMP Publications**, Manhasset, N.Y.	175.0	157.5	11.1	145.0	133.4	30.0	24.1	—	—	—	—	—	—
89	80	**U.S. News & World Report**, Washington	170.2	170.2	0.0	—	—	170.2	170.2	—	—	—	—	—	—
90	81	**Times Journal Co.**, Springfield, Va.	169.0	166.5	1.5	169.0	166.5	—	—	—	—	—	—	—	—
91	87	**Howard Publications**, Oceanside, Calif.	163.0	160.0	1.9	163.0	160.0	—	—	—	—	—	—	—	—
92	86	**General Media International**, New York	162.0	160.0	1.3	—	—	162.0	160.0	—	—	—	—	—	—
93	85	**LIN Broadcasting**, New York	157.8	162.4	(2.8)	—	—	23.4	23.4	134.5	139.0	—	—	—	—
94	93	**Playboy Enterprises**, Chicago	155.6	148.0	5.1	—	—	127.5	126.1	—	—	28.1	21.9	—	—
95	84	**Macromedia**, Hackensack, N.J.	154.8	163.3	(5.2)	127.3	135.8	—	—	27.5	27.5	—	—	—	—
96	96	**Pittway Corp.**, Northbrook, Ill.	153.4	144.5	6.2	—	—	153.4	144.5	—	—	—	—	—	—
97	97	**Straight Arrow**, New York	152.0	135.9	11.8	—	—	152.0	135.9	—	—	—	—	—	—
98	95	**Crain Communications**, Chicago	150.1	145.1	3.4	—	—	149.6	144.7	0.5	0.4	—	—	—	—
99	91	**Park Communications**, Ithaca, N.Y.	149.3	152.5	(2.1)	87.8	89.9	—	—	61.5	62.6	—	—	—	—
100	NR	**Ackerley Communications**, Seattle	147.6	134.6	9.7	—	—	—	—	63.4	50.1	—	—	84.2	84.4

Notes: Dollars are in millions. All figures are net revenues and AA estimates. 1989 rankings adjusted to reflect figures shown. *Broadcast revenues include TV and radio. This chart is an updated version from 100 Leading Media Companies (AA, August 12)

World's Top 50 advertising organizations

Ranked by equity gross income

Rank '90	Rank '89	Advertising organization, headquarters	U.S.-based agencies included	Worldwide gross income 1990	Worldwide gross income 1989	% chg	Worldwide capitalized billings 1990	Worldwide capitalized billings 1989	% chg
1	1	***WPP Group,*** London	Ogilvy & Mather Worldwide; Ogilvy & Mather Direct; J. Walter Thompson Co.; Thompson Recruitment; Brouillard Communications; Scali, McCabe, Sloves; Fallon McElligott; Martin Agency.	$2,715.0	$2,404.0	12.9	$18,095.0	$16,052.0	12.7
2	2	***Saatchi & Saatchi Co.,*** London	Saatchi & Saatchi Advertising Worldwide; AC&R Advertising; Cadwell Davis Partners; Cliff Freeman & Partners; Conill Advertising; Klemtner Advertising; Rumrill-Hoyt; Team One; Backer Spielvogel Bates Worldwide; Campbell-Mithun-Esty; Kobs & Draft.	1,729.3	1,575.8	9.7	11,861.7	10,802.4	9.8
3	3	***Interpublic Group of Cos.,*** New York	McCann-Erickson Worldwide; Lintas:Worldwide; Dailey & Associates; Laurence, Charles, Free & Lawson; Lowe & Partners; Fahlgren Martin.	1,664.0	1,493.7	11.4	11,190.0	9,984.6	12.1
4	5	***Omnicom Group,*** New York	BBDO Worldwide; Baxter, Gurian & Mazzei; Frank J. Corbett Inc.; Doremus & Co.; Lavey/Wolff/Swift; Tracy-Locke; Rapp Collins Marcoa; DDB Needham Worldwide; Bernard Hodes Group; Kallir, Philips, Ross.	1,335.5	1,177.9	13.4	9,699.6	8,405.3	15.4
5	4	***Dentsu Inc.,*** Tokyo	DCA Advertising	1,254.8	1,262.7	(0.6)	9,671.6	9,695.5	(0.2)
6	6	***Young & Rubicam,*** New York	Young & Rubicam; Cato Johnson Worldwide; Chapman Direct; Sudler & Hennessey; Creswell, Munsell, Fultz & Zirbel; Wunderman Worldwide; Dentsu, Young & Rubicam Partnerships (including Y&R's 50% equity in Lord, Dentsu & Partners).	1,073.6	925.6	16.0	8,000.7	6,652.0	20.3
7	11	***Eurocom Group**,*** Paris	Della Femina, McNamee	748.5	472.3	58.5	5,065.7	3,195.5	58.5
8	7	***Hakuhodo Inc.,*** Tokyo	Hakuhodo Advertising America	586.3	585.5	0.1	4,529.4	4,449.2	1.8
9	9	***Grey Advertising,*** New York	Grey Advertising	583.3	489.9	19.1	3,910.4	3,267.4	19.7
10	8	***Foote, Cone & Belding Communications,*** Chicago	Foote, Cone & Belding Communications; Albert Frank-Guenther Law; Impact; Vicom/FCB; Publicis-FCB Communications (49%).	536.2	506.5	5.9	3,554.8	3,371.8	5.4
11	12	***D'Arcy Masius Benton & Bowles,*** New York	D'Arcy Masius Benton & Bowles; Medicus Intercon International; Clarion Marketing & Communications.	532.5	471.5	12.9	4,406.7	3,803.1	15.9
12	10	***Leo Burnett Co.,*** Chicago	Leo Burnett USA	531.8	483.8	9.9	3,585.4	3,245.5	10.5
13	13	***Publicis-FCB Communications,*** Paris	Publicis Inc.	430.0	358.8	19.9	2,910.7	2,405.4	21.0
14	14	***Roux Seguela Cayzac & Goudard**,*** Issy les Moulineaux, France	Tatham-RSCG; Lally, McFarland & Pantello; Messner Vetere Berger Carey Schmetterer.	346.2	224.4	54.3	2,354.5	1,713.1	37.4
15	19	***BDDP Worldwide,*** Boulogne, France	Wells Rich Greene BDDP (40%).	236.0	151.3	56.0	1,487.4	1,061.2	40.2
16	16	***Bozell, Jacobs, Kenyon & Eckhardt,*** New York	Bozell Inc.; Poppe Tyson.	214.0	201.0	6.5	1,570.0	1,475.0	6.4
17	15	***N W Ayer,*** New York	N W Ayer	185.9	210.5	(11.7)	1,469.2	1,398.2	5.1
18	17	***Tokyu Agency,*** Tokyo	NA	170.3	165.7	2.8	1,387.0	1,322.7	4.9
19	18	***Daiko Advertising,*** Osaka, Japan	NA	159.5	152.1	4.9	1,246.9	1,214.1	2.7
20	22	***Alliance International Advertising Group,*** London	Warwick Baker & Fiore.	141.8	124.9	13.5	945.0	837.9	12.8
21	24	***TBWA Advertising,*** New York	TBWA Advertising.	138.3	118.8	16.4	922.0	794.6	16.0
22	20	***Chiat/Day/Mojo,*** Venice, Calif.	Chiat/Day/Mojo.	136.8	133.5	2.5	991.7	936.3	5.9
23	26	***Ketchum Communications,*** Pittsburgh	Ketchum Advertising.	134.2	117.8	14.0	1,030.4	915.7	12.5
24	21	***Dai-Ichi Kikaku Co.,*** Tokyo	NA	133.8	131.0	2.2	916.2	845.0	8.4
25	25	***Dentsu, Young & Rubicam Partnerships,*** New York/Tokyo	Lord, Dentsu & Partners.	126.8	118.7	6.9	884.1	836.6	5.7
26	23	***Asatsu Inc.,*** Tokyo	NA	125.0	121.5	2.9	970.3	1,223.7	(20.7)
27	28	***Ross Roy Group,*** Bloomfield Hills, Mich.	Ross Roy Group.	110.0	100.2	9.8	707.0	651.1	8.6
28	30	***Wells Rich Greene BDDP,*** New York	Wells Rich Greene BDDP.	105.0	95.0	10.5	845.0	765.0	10.5
29	29	***I&S Corp.,*** Tokyo	NA	104.2	96.3	8.2	833.2	770.2	8.2
30	27	***Yomiko Advertising,*** Tokyo	NA	102.9	100.3	2.5	795.6	753.5	5.6
31	33	***GGT PLC,*** London	GSD&M; Babbit & Reiman Advertising; Martin-Williams.	95.0	87.3	8.8	692.6	620.8	11.6
32	32	***Asahi Advertising,*** Tokyo	NA	88.9	87.4	1.8	522.7	524.5	(0.3)
33	31	***Man Nen Sha,*** Osaka, Japan	NA	87.0	92.0	(5.5)	566.0	601.4	(5.9)
34	35	***FCAB,*** Suresnes, France	Bloom FCA	83.1	68.4	21.6	600.7	493.1	21.8
35	34	***GGK International,*** Zurich**	Lois/GGK Chicago; Lois/GGK New York.**	79.3	71.3	11.2	556.7	487.5	14.2
36	38	***Cheil Communications,*** Seoul	NA	73.1	64.2	13.7	274.1	249.3	10.0
37	36	***MPM Propaganda,*** Sao Paulo	NA	65.2	66.2	(1.4)	189.5	198.6	(4.6)
38	46	***Armando Testa Group Worldwide,*** Turin, Italy	Armando Testa Advertising, New York.	63.3	50.5	25.3	481.8	360.5	33.7
39	39	***Nihon Keizaisha Advertising,*** Tokyo	NA	62.5	56.3	11.0	366.3	337.3	8.6
40	40	***Sogei Inc.,*** Tokyo	NA	57.8	53.4	8.2	364.6	330.9	10.2
41	44	***Orikomi Advertising,*** Tokyo	NA	57.5	50.8	13.1	440.0	435.8	1.0
42	50	***Telephone Marketing Programs,*** New York	Telephone Marketing Programs.	55.8	40.5	37.7	371.9	270.1	37.7
43	41	***W.B. Doner & Co.,*** Southfield, Mich.	W.B. Doner & Co.	51.4	52.1	(1.3)	395.4	381.0	3.8
44	42	***Clemenger/BBDO,*** Melbourne	NA	50.7	52.0	(2.4)	317.0	324.8	(2.4)
45	37	***CDP Europe,*** London	NA	50.5	65.0	(22.4)	354.2	405.2	(12.6)
46	43	***Hill, Holliday, Connors, Cosmopulos,*** Boston	Hill, Holliday, Connors, Cosmopulos	50.1	51.6	(3.0)	333.9	344.0	(3.0)
47	48	***Admarketing Inc.,*** Los Angeles	Admarketing Inc.	49.7	46.2	7.6	285.5	260.5	9.6
48	45	***Chuo Senko Advertising Co.,*** Tokyo	NA	49.1	50.6	(2.9)	356.4	376.5	(5.4)
49	47	***Earle Palmer Brown Cos.,*** Bethesda, Md.	Earle Palmer Brown Cos.	48.5	47.4	2.3	378.2	364.1	3.9
50	49	***Oricom Inc.,*** Seoul	NA	46.2	45.3	2.0	174.0	173.6	0.2

Notes: Dollars are in millions. Some of the Top 50 hold minority equity in each other as follows: Publicis-FCB Communications is 49% owned by Foote, Cone & Belding Communications. Omnicom Group owns 46.67% of Clemenger/BBDO. BDDP Worldwide owns 40% of Wells Rich Greene BDDP. Young & Rubicam and Dentsu Inc. each own 50% of Dentsu, Young & Rubicam Partnerships. *Eurocom and RSCG agreed to merge in October 1991, forming Euro RSCG. **Lois/GGK bought itself back from GGK International in December 1991 and as an independent is now called Lois/USA. This chart is an updated version from the Agency Report (AA, March 25).

Top 200 U.S. agency brands

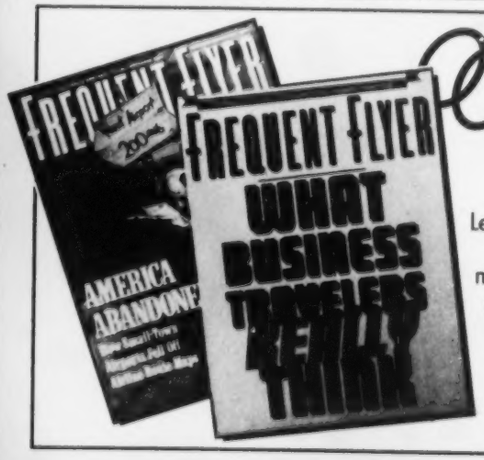
Rank 1990	Rank 1989		Agency, headquarters	U.S. gross income 1990	U.S. gross income % chg	U.S. billings 1990
1	1	✓	**Leo Burnett Co.**, Chicago	$299.3	3.7	$2,035.2
2	3		**Saatchi & Saatchi Advertising Worldwide**, New York	270.7	10.1	1,860.9
3	2	✓	**Foote, Cone & Belding Communications**, Chicago	262.7	4.6	1,753.2
4	4	✓	**Grey Advertising**, New York	256.3	6.5	1,710.0
5	5	✓	**J. Walter Thompson Co.**, New York	251.7	7.1	1,787.4
6	6		**Ogilvy & Mather Worldwide**, New York	229.7	2.5	1,606.1
7	7	✓	**Young & Rubicam**, New York	216.6	2.7	2,112.3
8	8	✓	**McCann-Erickson Worldwide**, New York	210.1	0.5	1,401.4
9	10	✓	**BBDO Worldwide**, New York	207.1	10.8	1,320.1
10	12	✓	**D'Arcy Masius Benton & Bowles**, New York	204.4	14.6	1,978.2
11	9	✓	**Lintas:Worldwide**, New York	203.1	1.2	1,354.6
12	11	✓	**DDB Needham Worldwide**, New York	191.9	5.7	1,631.9
13	13	✓	**Backer Spielvogel Bates Worldwide**, New York	170.5	(3.7)	1,136.0
14	14	✓	**Bozell Inc.**, New York	155.5	0.1	1,175.0
15	17	✓	**Ketchum Communications**, Pittsburgh	121.3	7.4	944.0
16	16	✓	**Campbell-Mithun-Esty**, Minneapolis	120.3	3.8	892.5
17	18		**Ross Roy Group**, Bloomfield Hills, Mich.	106.0	9.3	707.0
18	19		**Wells Rich Greene BDDP**, New York	105.0	10.5	845.0
19	15		**NW Ayer**, New York	99.4	(22.8)	892.2
20	21		**Della Femina, McNamee**, New York	94.2	7.3	782.0
21	20	✓	**Chiat/Day/Mojo Advertising**, Venice, Calif.	88.7	1.0	682.0
22	22	✓	**Tracy-Locke**, Dallas	57.1	2.7	406.3
23	27		**Ogilvy & Mather Direct**, New York	53.1	20.1	354.2
24	33	✓	**Telephone Marketing Programs**, New York	52.8	39.5	351.7
25	26		**Lowe & Partners**, New York *	48.8	9.3	325.0
26	25		**Admarketing Inc.**, Los Angeles	48.5	8.0	277.2
27	23		**Earle Palmer Brown Cos.**, Bethesda, Md.	48.5	2.3	378.2
28	29	✓	**Hill, Holliday, Connors, Cosmopulos**, Boston	46.1	4.9	307.5
29	30		**Hal Riney & Partners**, San Francisco *	45.0	33.1	300.0
30	28		**W.B. Doner & Co.**, Southfield, Mich.	42.6	(3.5)	311.8
31	39		**TBWA Advertising**, New York	42.2	26.9	281.2
32	31		**Jordan, McGrath, Case & Taylor**, New York	41.0	6.5	340.0
33	32		**McCaffrey & McCall**, New York	40.2	5.2	268.5
34	35	✓	**Ally & Gargano**, New York	38.2	3.2	328.0
35	36	✓	**Wunderman Worldwide**, New York	38.1	9.3	254.4
36	37	✓	**Laurence, Charles, Free & Lawson**, New York	35.7	3.1	284.0
37	30		**Scali, McCabe, Sloves**, New York	34.0	(18.9)	236.1
38	24		**AC&R Advertising**, New York	33.6	(26.7)	291.6
39	40		**Nationwide Advertising Service**, Cleveland	31.4	1.4	209.6
40	43		**Ammirati & Puris**, New York *	30.6	6.8	235.0
41	41	✓	**Bernard Hodes Group**, New York	30.2	(0.8)	201.4
42	44		**Tatham/RSCG**, Chicago	28.7	3.7	278.2
43	42	✓	**Lord, Dentsu & Partners**, New York	28.2	(7.1)	226.2
44	54	✓	**Cato Johnson Worldwide**, New York	28.2	24.7	191.6
45	48	✓	**Evans Communications**, Salt Lake City	26.7	11.3	177.0
46	66	✓	**Clarion Marketing & Communications**, Greenwich, Conn.	26.0	38.4	186.9
47	47	✓	**Sudler & Hennessey**, New York	26.0	5.7	173.4
48	46		**Warwick Baker & Fiore**, New York	25.8	1.0	170.0
49	49	✓	**Rapp Collins Marcoa**, Chicago	25.5	7.2	243.2
50	88		**Tarlow Advertising**, New York	25.4	73.7	191.1
51	60		**Ferguson Communications Group**, Parsippany, N.J.	25.4	23.2	144.3
52	58		**Martin Agency**, Richmond, Va.	25.3	20.2	155.2
53	76	✓	**Nelson Communications**, New York	25.2	56.3	242.1
54	87	✓	**Medicus Intercon International**, New York	24.1	63.7	198.3
55	56		**Keller-Crescent**, Evansville, Ind.	23.9	12.1	120.4
56	52		**Dailey & Associates**, Los Angeles	23.7	2.0	178.3
57	50	✓	**Fahlgren Martin**, Parkersburg, W. Va.	23.2	(1.8)	154.7
58	53		**Direct Marketing Group**, New York *	22.7	(2.3)	146.2
59	55	✓	**Thompson Recruitment Advertising**, Los Angeles	22.3	3.1	149.0
60	57	✓	**Kallir, Philips, Ross**, New York	22.2	4.5	181.5
61	51	✓	**Berry Network**, Dayton, Ohio	21.3	(8.7)	89.6
62	59		**Griffin Bacal**, New York	21.3	3.0	166.3
63	67		**Richards Group**, Dallas	20.9	11.8	140.0
64	77	✓	**Lavey/Wolff/Swift**, New York	20.4	26.4	136.0
65	68		**Kobs & Draft Advertising**, Chicago *	20.4	14.9	134.3
66	64		**Geer, DuBois**, New York	20.3	3.8	135.0
67	62	✓	**Bloom FCA**, Dallas	20.0	0.0	174.1
68	61		**GSD&M**, Austin, Texas	20.0	(1.3)	149.0
69	80		**Team One**, El Segundo, Calif.	20.0	25.2	137.7
70	65	✓	**Rosenfeld, Sirowitz, Humphrey & Strauss**, New York	19.4	1.6	129.0
71	83		**Avrett, Free & Ginsburg**, New York	19.3	24.2	160.0
72	93		**Margeotes Fertitta & Weiss**, New York	19.2	40.3	124.9
73	73	✓	**Eisaman, Johns & Laws Advertising**, Los Angeles	19.1	14.3	145.2
74	75		**William Douglas McAdams Inc.**, New York *	18.8	14.3	153.2
75	63		**Wyse Advertising**, Cleveland	18.4	(7.4)	147.2
76	74		**Weightman Group**, Philadelphia	18.0	9.1	120.0
77	79		**Bayer Bess Vanderwarker**, Chicago *	17.9	11.5	116.6
78	85		**Kleminer Advertising**, New York	17.6	13.5	134.4
79	69	✓	**Rubin Postaer & Associates**, Santa Monica, Calif.	17.5	0.5	163.2
80	81	✓	**Cramer-Krasselt**, Milwaukee	17.0	7.3	115.5
81	45	✓	**Lois/USA New York**, New York	16.9	17.4	136.8
82	70	✓	**Ingalls, Quinn & Johnson**, Boston	16.7	(1.6)	134.4
83	72	✓	**Davis, Ball & Colombatto**, Los Angeles	16.5	(1.6)	133.2
84	124		**DMCA Direct**, Bridgeton, Mo. *	16.2	75.7	107.8
85	82		**Saugatuck Direct**, Westport, Conn.	15.9	2.4	102.4
86	90		**Partners & Shevack**, New York	15.9	12.0	162.0
87	91	✓	**Tucker Wayne/Luckie & Co.**, Atlanta	15.5	9.6	116.2
88	159	✓	**Cadwell Davis Partners**, New York	15.1	118.5	101.0
89	99	✓	**Bowes Dentsu & Partners**, Los Angeles	15.1	5.1	97.1
90	84		**Long, Haymes & Carr**, Winston-Salem, N.C.	15.1	(2.9)	100.8
91	155	✓	**Chapman Direct Advertising**, New York	15.0	107.7	100.1
92	98		**M.E.D. Communications**, Woodbridge, N.J.	15.0	17.7	100.0
93	105	✓	**Valentine-Radford**, Kansas City, Mo.	14.6	24.1	97.6
94	100	✓	**Carmichael Lynch**, Minneapolis	14.4	18.8	105.1
95	94		**Vloom/FCB**, San Francisco	14.3	9.2	95.4
96	NA	✓	**Bernstein-Rein**, Kansas City, Mo.	14.0	52.2	106.0
97	71	✓	**Doremus & Co.**, New York	13.9	(17.6)	102.1
98	96		**Rumrill-Hoyt**, Rochester, N.Y.	13.6	4.4	89.1
99	102		**Al Paul Lefton Co.**, New York	13.5	13.4	85.0
100	101		**Martin-Williams**, Minneapolis	13.3	9.9	108.0
101	133		**Cliff Freeman & Partners**, New York	$13,260.0	56.9	$102,000.0
102	86		**McKinney & Silver**, Raleigh, N.C.	13,172.1	(14.7)	87,815.8
103	107	✓	**Lois/USA Chicago**, Chicago	13,075.0	14.7	87,150.0
104	111		**Slater Hanft Martin**, New York	12,965.0	22.4	85,236.0
105	78		**Fallon McElligott**, Minneapolis	12,879.5	(19.7)	97,093.7
106	113		**Mullen Advertising**, Wenham, Mass.	12,795.0	22.4	85,300.3
107	151	✓	**Eric Mower & Associates**, Syracuse, N.Y.	12,569.7	68.1	86,427.3
108	99	✓	**Barry Blau & Partners**, Fairfield, Conn.	12,382.0	(0.3)	100,916.0
109	92	✓	**Asher/Gould Advertising**, Los Angeles	12,150.0	(12.9)	81,000.0
110	97	✓	**DCA Advertising**, New York	11,875.4	(7.5)	84,841.9
111	108		**Noble Communications**, Springfield, Mo.	11,711.6	5.6	84,477.8
112	106	✓	**Gross Townsend Frank Hoffman**, New York	11,701.0	(0.5)	78,100.0
113	144	✓	**Grace & Rothschild Advertising**, New York	11,660.0	51.1	79,050.0
114	NA	✓	**Kresser/Craig**, Santa Monica, Calif.	11,300.0	11.8	77,200.0
115	119	✓	**Brouillard Communications**, New York	11,132.6	14.3	74,254.7
116	157	✓	**Robinson, Yesawich & Pepperdine**, Orlando, Fla.	11,019.8	56.5	64,294.2
117	NA		**Goldberg Moser O'Neill**, San Francisco	10,950.0	NA	73,000.0
118	95		**Cabot Communications**, Boston	10,936.0	(16.2)	72,916.1
119	109	✓	**Liggett-Stashower**, Cleveland	10,900.0	(0.5)	72,400.0
120	117	✓	**Impact**, Chicago	10,635.0	6.0	69,700.0
121	120		**Messner Vetere Berger Carey Schmetterer**, New York	10,470.1	7.6	77,556.5
122	116		**Epsilon Data Management**, Burlington, Mass.	10,398.0	1.6	69,320.0
123	104		**Cole & Weber**, Seattle	10,369.5	(12.5)	83,000.0
124	121	✓	**Devon Direct Marketing & Advertising**, Berwyn, Pa.	10,300.0	7.3	94,200.0
125	110		**Bentley, Barnes & Lynn**, Chicago	10,288.9	(4.3)	68,592.9
126	118	✓	**Frank J. Corbett Inc.**, Chicago	10,219.8	3.6	68,166.3
127	115	✓	**William Cook Agency**, Jacksonville, Fla.	10,209.5	(0.9)	70,248.9
128	122		**Richardson, Myers & Donofrio**, Baltimore *	9,984.4	4.9	62,130.0
129	153	✓	**Hamilton, Carver & Lee**, Chicago	9,900.0	34.1	63,400.0
130	114	✓	**Carrafiello-Diehl & Associates**, Irvington, N.Y.	9,765.0	(6.6)	65,150.5
131	140		**Goodwin, Dannenbaum, Littman & Wingfield**, Houston	9,648.0	20.9	63,305.0
132	128		**Dorritie Lyons & Nickel**, New York *	9,609.5	10.3	60,000.0
133	103		**Henderson Advertising**, Greenville, S.C.	9,508.0	(19.8)	70,429.0
134	125	✓	**Ackerman, Hood & McQueen Advertising**, Oklahoma City	9,449.2	3.6	71,648.0
135	127	✓	**Hesselbart & Mitten Advertising**, Fairlawn, Ohio	9,422.7	4.7	62,811.4
136	138	✓	**Bader Rutter & Associates**, Brookfield, Wis.	9,371.2	15.4	62,489.0
137	132		**Jack Levy & Associates**, Chicago	9,314.3	9.9	62,095.5
138	135		**Berenter Greenhouse & Webster**, New York	9,196.0	10.8	66,776.0
139	123		**Meldrum & Fewsmith**, Cleveland	9,127.4	(3.9)	65,294.1
140	126		**Burrell Advertising**, Chicago	8,751.0	(3.3)	58,340.0
141	146	✓	**Rotando Lerch & Iafeliece**, Stamford, Conn.	8,690.0	13.0	71,400.0
142	142		**Miller Meester Advertising**, Minneapolis	8,600.0	8.9	57,362.0
143	143	✓	**Romann & Tannenholz Advertising**, New York	8,575.1	10.5	54,925.5
144	160		**Frankenberry, Laughlin & Constable**, Milwaukee	8,520.0	25.7	56,800.0
145	150		**Lally, McFarland & Pantello**, New York	8,500.0	13.3	67,100.0
146	162		**Goodby, Berlin & Silverstein**, San Francisco *	8,479.0	25.4	55,165.0
147	141		**Fogarty & Klein/Winius Brandon**, Houston	8,471.3	7.0	56,475.1
148	139	✓	**Dugan/Farley Communications**, Upper Saddle River, N.J.	8,433.9	4.8	55,149.5
149	191		**Trahan, Burden & Charles**, Baltimore	8,370.0	61.0	54,800.0
150	112	✓	**Poppe Tyson**, New York	8,350.0	(20.9)	65,000.0
151	136		**Martin Marshall Jaccoma Mitchell**, New York	8,250.0	0.0	55,000.0
152	171		**Arnold Advertising**, Boston	8,219.7	33.1	56,169.7
153	178	✓	**Greenstone Roberts**, Melville, N.Y.	8,216.4	41.0	54,952.4
154	129	✓	**Elkman Advertising & PR**, Bala-Cynwyd, Pa.	7,990.5	(7.8)	53,270.0
155	158	✓	**J. Richard Smith Advertising**, Old Bethpage, N.Y.	7,980.0	15.0	44,029.6
156	130	✓	**McAdams, Richman & Ong**, Bala-Cynwyd, Pa.	7,965.4	(6.8)	54,000.1
157	154	✓	**Borders, Perrin & Norrander**, Portland, Ore.	7,757.0	6.8	54,484.0
158	198	✓	**Cline, Davis & Mann**, New York	7,725.5	56.1	51,295.4
159	149	✓	**MARC Advertising**, Pittsburgh	7,611.0	0.9	50,765.4
160	147		**Mendoza, Dillon & Asociados**, Newport Beach, Calif.	7,589.4	(1.0)	62,665.2
161	152		**Chuck Ruhr Advertising**, Minneapolis	7,540.0	1.4	58,000.0
162	NA	✓	**Serino Coyne**, New York	7,535.0	NA	58,121.0
163	177		**Buntin Advertising**, Nashville, Tenn.	7,444.1	27.6	49,267.0
164	131		**Marketing Resources**, Overland Park, Kan.	7,374.7	(13.4)	49,190.0
165	164		**Waring & LaRosa**, New York	7,250.0	9.2	62,800.0
166	317		**Lewis & Gaco**, Fort Lee, N.J.	7,200.0	213.0	48,702.6
167	137	✓	**Colle & McVoy**, Minneapolis	7,129.3	(13.0)	50,102.7
168	145		**William R. Biggs/Gilmore Associates**, Kalamazoo, Mich.	7,030.0	(8.8)	47,101.0
169	161	✓	**Eisner & Associates**, Baltimore	6,976.3	3.2	57,223.3
170	163	✓	**Grant/Jacoby**, Chicago	6,800.0	1.5	66,200.0
171	167	✓	**Hameroff/Milenthal/Spence**, Columbus, Ohio	6,786.3	6.5	44,353.9
172	184	✓	**Stern Walters Partners**, Chicago	6,753.0	20.8	45,022.0
173	179	✓	**Price McNabb Advertising**, Asheville, N.C.	6,654.4	15.9	42,606.2
174	168		**Ericson Marketing Communications**, Nashville	6,599.8	4.3	44,020.8
175	170	✓	**Korey Kay & Partners**, New York	6,562.4	5.0	43,005.2
176	182	✓	**Austin Kelley Advertising**, Atlanta	6,312.7	12.2	47,138.2
177	201		**Gilbert, Whitney & Johns**, Whippany, N.Y.	6,300.0	32.8	42,000.0
178	165		**McFarland & Drier**, Miami *	6,300.0	(3.1)	42,000.0
179	156	✓	**Mintz & Hoke**, Avon, Conn.	6,204.0	(13.4)	41,353.0
180	173		**Sacks & Rosen Advertising**, New York	6,122.0	1.1	39,700.0
181	185		**Hoffman York & Compton**, Milwaukee	6,108.3	10.7	40,148.4
182	148		**Babbit & Reiman Advertising**, Atlanta	6,100.0	(19.7)	50,411.0
183	134	✓	**Gearon Hoffman Conlon & Nye**, Boston	6,047.9	(27.2)	39,844.5
184	176	✓	**Abelson-Taylor**, Chicago	6,039.5	3.2	45,847.2
185	210		**CHC Advertising**, Woodridge, N.J.	6,000.0	33.3	41,500.0
186	174	✓	**Campbell & Wagman**, Los Angeles	5,970.0	(1.4)	39,800.0
187	NA	✓	**Mars Advertising**, Southfield, Mich.	5,951.3	NA	40,336.7
188	183		**Jordan Tamraz Caruso Advertising**, Chicago	5,772.0	3.0	38,480.0
189	166		**VanSant, Dugdale & Co.**, Baltimore	5,710.3	(10.6)	38,069.0
190	181	✓	**Ad Team**, North Miami Beach, Fla.	5,660.0	0.0	37,450.0
191	195		**Wolf, Mansfield, Bolling**, Buffalo, N.Y.	5,657.0	11.5	45,350.0
192	205		**Dorland Sweeney Jones**, Philadelphia	5,630.6	23.7	40,103.5
193	186		**Kolon, Bittker & Desmond**, Troy, Mich.	5,600.0	1.8	33,500.0
194	217	✓	**Publicis Inc.**, New York	5,499.0	30.7	44,371.6
195	200		**Stenrich Group**, Glen Allen, Va.	5,485.0	15.1	39,122.6
196	228	✓	**Cranford Johnson Robinson Woods**, Little Rock, Ark.	5,459.7	39.0	36,415.9
197	172	✓	**Paolin & Sweeney**, Cherry Hill, N.J.	5,400.0	(11.5)	28,500.0
198	238		**McDougall Associates**, Peabody, Mass.	5,385.0	45.3	35,710.0
199	189		**Cox Landey & Partners**, New York *	5,382.5	0.0	35,000.0
200	209	✓	**Bender, Browning, Dolby & Sanderson**, Chicago	5,375.0	19.4	35,833.1

Notes: Dollars are in millions. ✓ indicates that the agency received signature of an independent accountant verifying figures supplied to AA. * indicates that gross income figures are AA estimates. 1989 rankings are computed from figures reported in 1990. This chart is an updated version from the Agency Report (AA, March 25).

Total U.S. ad spending by category and media

Category	Year	Total ad spending	Magazine	Sunday magazines	Newspaper	Outdoor	Network TV	Spot TV	Syndicated TV	Cable TV	Network radio	Spot radio
Retail	**1990**	**$6,494.2**	**$249.1**	**$119.7**	**$3,823.1**	**$68.9**	**$356.0**	**$1,499.1**	**$20.6**	**$38.7**	**$101.5**	**$217.6**
	1989	6,170.4	204.6	110.1	3,650.1	72.2	294.8	1,493.7	13.2	30.4	102.9	198.3
Automotive	**1990**	**5,700.7**	**901.2**	**25.5**	**809.2**	**53.0**	**1,790.0**	**1,664.8**	**115.7**	**114.1**	**106.7**	**120.5**
	1989	5,382.7	882.5	29.1	882.1	59.7	1,520.0	1,656.4	64.9	85.9	85.2	117.0
Business, consumer svcs	**1990**	**3,958.5**	**519.1**	**45.0**	**1,320.1**	**64.7**	**698.6**	**861.7**	**56.8**	**100.9**	**114.8**	**177.6**
	1989	3,805.9	525.1	40.3	1,401.7	61.4	624.9	814.5	46.6	96.6	92.8	102.0
Food	**1990**	**3,874.0**	**449.3**	**34.7**	**45.4**	**11.0**	**1,663.5**	**1,025.2**	**351.7**	**124.7**	**75.1**	**93.4**
	1989	3,651.7	437.5	21.6	49.4	10.2	1,661.6	911.8	314.5	103.5	74.5	67.0
Entertainment	**1990**	**3,063.6**	**44.4**	**3.0**	**611.3**	**47.2**	**875.1**	**1,170.8**	**147.2**	**62.3**	**14.8**	**87.5**
	1989	2,778.1	26.0	2.4	518.1	49.8	823.8	1,144.4	76.2	50.8	9.3	77.2
Toiletries & cosmetics	**1990**	**2,333.3**	**675.6**	**27.3**	**5.4**	**2.6**	**1,034.3**	**279.5**	**188.7**	**87.7**	**17.0**	**15.2**
	1989	2,195.0	648.9	32.3	5.9	3.2	921.5	301.3	165.7	82.3	19.7	14.3
Travel, hotels	**1990**	**2,215.9**	**374.5**	**37.9**	**1,048.6**	**49.9**	**203.7**	**324.7**	**10.2**	**37.4**	**42.2**	**86.8**
	1989	2,075.2	366.2	39.7	980.8	50.6	194.0	283.0	5.9	31.9	42.3	80.7
Drugs & remedies	**1990**	**1,690.7**	**160.4**	**17.5**	**118.1**	**13.6**	**787.2**	**320.0**	**133.9**	**60.5**	**53.4**	**26.2**
	1989	1,525.8	133.5	20.3	106.6	12.9	739.0	270.5	117.9	58.7	55.6	10.9
Snacks & soft drinks	**1990**	**1,231.0**	**64.5**	**3.5**	**22.4**	**10.1**	**452.1**	**382.8**	**168.4**	**52.8**	**29.4**	**45.1**
	1989	1,077.8	53.7	3.2	16.4	6.7	408.3	352.2	120.9	47.6	38.2	30.6
Direct response cos.	**1990**	**1,210.5**	**526.4**	**253.5**	**103.2**	**2.2**	**34.5**	**110.5**	**28.5**	**81.9**	**59.5**	**10.3**
	1989	1,155.0	507.5	226.4	106.0	2.7	62.5	125.7	24.6	62.3	31.6	5.6
Apparel, footwear	**1990**	**912.1**	**426.5**	**29.4**	**13.1**	**7.9**	**230.5**	**100.7**	**52.9**	**38.9**	**4.0**	**8.3**
	1989	836.1	391.6	30.3	11.3	7.1	232.2	89.8	27.2	36.4	3.4	6.8
Insurance & real estate	**1990**	**896.2**	**131.0**	**16.1**	**307.1**	**28.4**	**204.1**	**129.3**	**8.9**	**16.6**	**31.3**	**23.5**
	1989	887.5	134.2	19.0	334.1	30.6	193.5	111.5	4.4	15.7	22.4	22.2
Beer & wine	**1990**	**751.5**	**45.5**	**3.5**	**10.3**	**20.0**	**382.1**	**210.4**	**45.2**	**37.0**	**5.0**	**72.4**
	1989	837.5	41.7	2.8	23.0	20.5	380.9	220.6	36.0	38.4	9.2	64.4
Publishing & media	**1990**	**739.8**	**215.5**	**7.9**	**233.0**	**38.6**	**29.4**	**130.2**	**5.8**	**23.6**	**17.8**	**38.0**
	1989	709.8	192.6	4.6	248.3	47.7	11.3	148.1	2.5	18.6	15.2	20.8
Household equip.	**1990**	**661.7**	**117.9**	**13.8**	**25.8**	**1.3**	**260.4**	**146.7**	**40.6**	**27.9**	**18.1**	**9.2**
	1989	630.4	103.0	10.9	22.9	0.7	264.8	130.6	43.7	23.6	21.1	9.1
Sporting goods, toys	**1990**	**635.3**	**126.7**	**1.2**	**6.8**	**0.2**	**140.4**	**233.4**	**82.8**	**40.2**	**0.8**	**2.9**
	1989	596.6	130.6	0.7	7.1	0.2	125.9	218.0	81.4	29.6	1.2	1.8
Soaps & cleansers	**1990**	**632.9**	**61.0**	**0.8**	**2.9**	**2.8**	**305.6**	**155.4**	**67.7**	**30.6**	**0.1**	**6.1**
	1989	599.6	67.2	2.1	2.9	2.6	312.4	116.9	67.7	26.1	0.1	1.6
Computers, office equip	**1990**	**604.1**	**285.4**	**5.0**	**71.1**	**3.3**	**152.2**	**28.7**	**7.0**	**19.5**	**20.3**	**11.5**
	1989	647.0	288.9	8.5	92.1	2.4	165.6	42.3	4.9	16.9	13.3	12.1
Cigarettes, tobacco	**1990**	**585.2**	**311.3**	**52.2**	**30.3**	**182.6**	**0.0**	**4.4**	**0.5**	**0.4**	**3.2**	**0.4**
	1989	675.0	401.5	45.7	31.6	187.8	0.2	4.9	0.0	0.7	2.1	0.5
Jewelry, cameras	**1990**	**367.4**	**156.3**	**9.9**	**8.0**	**3.0**	**117.8**	**40.7**	**14.9**	**10.8**	**3.5**	**2.4**
	1989	360.8	153.5	11.4	11.5	1.8	105.5	52.9	11.0	10.0	1.1	2.0
Gasoline & lubricants	**1990**	**343.6**	**39.8**	**1.6**	**24.2**	**6.6**	**39.0**	**169.6**	**1.6**	**8.5**	**1.6**	**51.1**
	1989	308.1	28.6	1.6	25.8	6.1	38.3	164.4	0.6	9.7	4.1	28.8
Building materials	**1990**	**341.4**	**91.1**	**7.4**	**52.3**	**1.6**	**80.6**	**67.8**	**2.4**	**23.0**	**8.0**	**7.2**
	1989	360.7	81.7	7.9	56.2	1.6	92.0	85.2	2.6	18.1	10.8	4.6
Electronic entertainment	**1990**	**339.6**	**89.9**	**4.4**	**13.6**	**1.9**	**82.4**	**74.5**	**14.4**	**35.1**	**18.8**	**4.4**
	1989	336.6	102.5	2.8	12.2	1.8	58.9	85.7	18.0	30.7	17.3	6.6
Liquor	**1990**	**290.8**	**232.2**	**10.3**	**8.4**	**36.5**	**0.0**	**1.3**	**0.0**	**0.0**	**0.0**	**2.0**
	1989	272.8	214.9	11.0	9.0	36.9	0.0	0.4	0.0	0.0	0.0	0.6
Household furnishings	**1990**	**280.9**	**113.8**	**16.3**	**49.7**	**0.9**	**52.1**	**38.6**	**2.3**	**3.6**	**2.5**	**1.1**
	1989	324.4	122.6	23.8	42.6	0.9	69.8	57.2	1.7	2.1	2.3	1.2
Pets, pet foods	**1990**	**213.6**	**28.8**	**3.1**	**7.6**	**0.5**	**104.1**	**38.9**	**15.4**	**10.6**	**2.6**	**2.0**
	1989	273.8	45.8	4.4	4.6	0.3	133.9	40.9	28.4	10.7	4.2	0.6
Horticulture & farming	**1990**	**206.5**	**22.1**	**5.2**	**48.6**	**1.1**	**36.8**	**53.4**	**2.8**	**13.1**	**11.0**	**12.3**
	1989	211.3	24.5	3.2	49.9	0.9	39.0	65.8	5.1	8.2	10.5	4.3
Freight	**1990**	**133.1**	**37.1**	**0.2**	**10.5**	**1.4**	**51.4**	**23.6**	**0.1**	**3.7**	**0.4**	**4.7**
	1989	154.7	47.5	4.6	12.0	0.2	54.7	22.7	0.0	3.2	4.8	4.9
Industrial materials	**1990**	**129.5**	**64.9**	**1.1**	**9.5**	**0.8**	**44.1**	**2.2**	**0.1**	**4.4**	**1.1**	**1.2**
	1989	111.2	62.8	0.7	7.5	0.9	24.0	11.0	0.7	2.0	0.0	1.6
Business propositions	**1990**	**39.1**	**26.4**	**1.4**	**2.5**	**1.0**	**2.3**	**2.8**	**0.0**	**0.4**	**0.4**	**1.9**
	1989	32.4	20.3	0.4	2.4	0.6	3.3	3.6	0.0	0.5	0.9	0.3
Airplanes, aviation	**1990**	**23.0**	**19.3**	**0.1**	**2.4**	**0.1**	**0.2**	**0.4**	**0.0**	**0.1**	**0.3**	**0.2**
	1989	18.2	14.0	0.2	2.7	0.1	0.4	0.3	0.0	0.5	0.0	0.0
Miscellaneous	**1990**	**238.3**	**130.6**	**18.6**	**57.3**	**25.1**	**1.5**	**1.2**	**0.3**	**1.1**	**2.3**	**0.3**
	1989	236.0	139.3	15.2	50.5	24.4	1.8	3.3	0.4	0.8	0.1	0.4
Total	**1990**	**41,138.5**	**6,737.7**	**777.1**	**8,901.9**	**688.8**	**10,132.3**	**9,293.3**	**1,587.6**	**1,110.2**	**766.4**	**1,143.3**
	1989	39,238.0	6,595.0	737.0	8,777.4	705.8	9,559.0	9,029.4	1,286.7	952.5	696.2	898.7

Notes: Dollars are in millions. **Source:** LNA Arbitron Multi-Media Service. This chart is an updated version from 100 Leading National Advertisers (AA, Sept. 25).



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(the one with the presentation in it!)

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Total national ad spending by media

Category	100 Leading National Advertisers: Advertising expenditures 1990	1989	% chg	% of total 1990	1989	All U.S. advertising expenditures: Advertising expenditures 1990	1989	% chg	% of total 1990	1989	Coen's U.S. estimates* 1990	1989
Magazine	$2,882.1	$2,887.7	(0.2)	8.1	8.6	$6,737.7	$6,595.0	2.2	16.4	16.0	$6,903.0	$6,716.0
Sunday magazine	247.3	235.5	5.0	0.7	0.7	777.1	737.0	5.4	1.9	1.9	NA	NA
Newspaper	2,009.5	1,975.2	1.7	5.6	5.9	8,901.9	8,777.4	1.4	21.6	22.4	32,281.0	32,368.0
Outdoor	267.0	242.7	10.0	0.7	0.7	688.8	705.8	(2.4)	1.7	1.8	1,084.0	1,111.0
Network TV	7,846.8	7,286.0	7.7	22.0	21.6	10,132.3	9,559.0	6.0	24.6	24.4	9,383.0	9,110.0
Spot TV	3,938.7	3,575.2	10.2	11.1	10.6	9,293.3	9,029.4	2.9	22.6	23.0	15,644.0	14,966.0
Syndicated TV	1,256.5	973.5	29.3	3.5	2.9	1,587.6	1,286.7	23.4	3.9	3.3	1,589.0	1,288.0
Cable TV networks	633.9	527.1	20.3	1.8	1.6	1,110.2	952.5	16.6	2.7	2.4	1,393.0	1,197.0
Network radio	417.4	422.1	(1.1)	1.2	1.3	706.4	696.2	10.1	1.9	1.8	482.0	476.0
Spot radio	391.5	687.3	(43.0)	1.1	2.0	1,143.3	898.7	27.2	2.8	2.3	8,244.0	7,847.0
All other advertising	15,720.9	14,997.7	5.5	44.1	44.2	87,501.4	84,692.3	3.3	68.0	68.3	51,737.0	48,851.0
Total U.S. ad spending	35,613.7	33,720.0	5.6	100.0	100.0	128,640.0	123,930.0	4.8	100.0	100.0	128,640.0	123,930.0

Notes: Dollars are in millions.
Sources: LNA/Arbitron Multi-Media Service. *Total U.S. advertising volume as estimated by Robert J. Coen, McCann-Erickson (AA, May 6). This chart is reprinted from 100 Leading National Advertisers (AA, Sept. 25).

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